

Table of Contents

About the CIMdata PLM Market Analysis Report Series	i
Table of Contents	iii
Index to Figures	v
Index to Tables	v
Introduction	1
The Market and Industry.....	1
Worldwide Manufacturing	1
Machine Tools	2
CAM Software and Related Services Market	4
Total CAM Software Market Size and Growth	5
Trends in Technology and Business Structure	9
The Growing Need for More Sophisticated CAM.....	9
CAM Market Mergers & Acquisitions	13
Cloud-Based CAM Applications.....	13
Expanded Use of CNC Machine Simulation	17
Conclusion	17
Market Sizing and Growth by Software and Related Services	17
Market Distributions.....	19
Market Distribution by Geography	20
Market Distribution by Industry	22
Market Distribution by Company Size	23
Market Distribution by Type of Product Produced	23
Market Distribution by Type of CAM Programmer	24
Distribution of Direct Revenue by CAM Product Function.....	25
Distribution of Programming Time by Machining Operation	26
Distribution of Revenue by Degree of Automation	27
Market Distribution by Sales Channel	29
Rankings Based on Direct Revenue.....	30
Market Shares of the Top Ten Providers.....	30
General Comments	32
Overall Direct Revenues and Rankings.....	33
Direct Revenue Ranking by Brand	38
Ranking of Verification and Post-Processor Providers.....	40
Post-Processing	41
Rapidly Growing Companies	42
CIMdata Comments on the Top-Ten CAM Software Providers.....	43

Dassault Systèmes	43
Siemens PLM Software	47
Vero Software	53
VISI	55
SURFCAM	59
WorkNC	60
Edgecam.....	61
Alphacam.....	63
Radan	65
Cabinet Vision.....	67
Delcam	67
OPEN MIND Technologies.....	72
Everything in a Single User Interface	73
Conventional 3D Machining.....	74
Cimatron	77
Tebis.....	81
CGTech	84
SolidCAM.....	87
Operating Environment.....	89
Knowledge-based Machining.....	90
iMachining.....	90
Basic Milling.....	91
High-Speed Surface Milling (HSS)	92
3-Axis High-Speed Milling.....	92
3+2 and Simultaneous 5-Axis Milling.....	93
Mill-Turn for Multi-Turret and Multi-Spindle CNC Machines	94
Toolpath and Machine Tool Simulation	94
CNC Software.....	94
CAM Software Market Size Based on End-User Payments	98
Market Share of the Top Ten Providers Based on End-User Payments	100
End-User Provider Rankings	101
Sizing of the CAM-Related Reseller Market.....	103
Software Seats	105
Software Seats Shipped and Installed Base	105
Provider Ranking by Industrial Seats Shipped and Installed Base.....	105
CAM Provider Ranking by Educational Seats Shipped and by Installed Base.....	115
Provider Ranking by Educational Seats Shipped, Installed Base, and Seats by Brand.....	119
Other Provider Comparisons.....	121
Headcount Comparisons	121
Sales Resources	124
Provider-Defined Pricing Trends	126

Price Change	126
Competitive Discounts	126
About CIMdata	128

Index to Figures

Figure 1: IMF Global GDP Growth Predictions	2
Figure 2: Size and Composition of the CAM Market	5
Figure 3: Revenue Growth at the Solution Provider Level	7
Figure 4: Revenue Growth of CAM Software and Services at the Solution Provider Level	19
Figure 5: Market Distribution by Geography	20
Figure 6: Distribution of the European Market	21
Figure 7: Distribution of the Asia-Pacific Market	21
Figure 8: Market Distribution by Industry	22
Figure 9: Market Distribution by Company Size	23
Figure 10: Market Distribution by Type of Product Produced	24
Figure 11: Market Distribution by Type of CAM Programmer	25
Figure 12: Distribution of Revenues by CAM Product Function	26
Figure 13: Market Distribution by Machining Operation	27
Figure 14: Distribution of Revenue by Degree of Automation	28
Figure 15: Distribution of Revenue by Sales Channel	29
Figure 16: Market Share of the Largest CAM Providers by Direct Revenue	31
Figure 17: Direct Revenue Market Shares of the Largest Providers, as Forecast	32
Figure 18: Worldwide CAM Software and Related Services Based on End-User Payments	98
Figure 19: Market Share of the Largest CAM Providers at the End-User Level	100
Figure 20: Size and Growth of CAM-Related Reseller and OEM Market Revenues	104
Figure 21: Market Share of CAM Providers Based on Industrial Seats Shipped	106
Figure 22: Market Share of CAM Providers Based on Industrial Seats Installed	106

Index to Tables

Table 1: 2015 Worldwide Machine Tool Production and Growth Rates	4
Table 2: 2015 Value of Machine Tools Consumed	4
Table 3: Size and Composition of the CAM Market	6
Table 4: End-User Payments and Annual Growth Rates	7
Table 5: Direct Revenues and Annual Growth Rates	8
Table 6: Sizing and Distribution of CAM Software and Related Services	18
Table 7: 2015 Ranking of CAM Providers Based on Direct Revenues	34
Table 8: Forecast 2016 Ranking of CAM Providers Based on Direct Revenues	35
Table 9: Comparison of 2014 Forecast of 2015 Revenue with Currently Estimated 2015 Revenue	36
Table 10: Market Positioning	37
Table 11: 2015 Ranking of Providers by Direct Revenue and Brand	39
Table 12: Forecast 2016 Ranking of Providers by Direct Revenue and Brand	40
Table 13: Largest Verification and Simulation Providers in 2015	41
Table 14: Companies with Largest Percentage Revenue Growth, 2014 to 2015	42
Table 15: 2016 Forecast of Most Rapidly Growing Companies by Direct Revenue	43
Table 16: CAM Market Size and Growth Rate Based on End-User Payments	99
Table 17: Forecast 2016 Market Share of the Top Ten Providers	101
Table 18: 2015 Ranking of CAM Providers Based on End-User Payments	102
Table 19: Forecast 2016 Ranking of CAM Providers Based on End-User Payments	103
Table 20: Size and Growth of CAM-Related Reseller and OEM Market Revenues, 2007 to 2016	104
Table 21: Summary of Seats Shipped and Installed by Year	105

CIMdata 2016 Market Analysis Report Series
CAM Market Analysis Report-Version 25

Table 22: 2015 Ranking of CAM Providers by Industrial Seats Shipped	108
Table 23: 2015 Ranking of CAM Providers by Industrial Seats Installed	109
Table 24: Forecast 2016 Ranking of CAM Providers by Industrial Seats Shipped	110
Table 25: Forecast 2016 Ranking of CAM Providers by Industrial Seats Installed	111
Table 26: 2015 Ranking of CAM Providers by Industrial Seats Shipped and by Brand	112
Table 27: 2015 Ranking of CAM Providers by Industrial Seats Installed and by Brand	113
Table 28: Forecast 2016 Ranking of CAM Providers by Industrial Seats Shipped and by Brand	114
Table 29: Forecast 2016 Ranking of CAM Providers by Industrial Seats Installed by Brand	115
Table 30: 2015 Ranking of CAM Providers by Educational Seats Shipped	116
Table 31: 2015 Ranking of CAM Providers by Education Seats Installed	117
Table 32: Forecast 2016 Ranking of CAM Providers by Educational Seats Shipped	118
Table 33: Forecast 2016 Ranking of CAM Providers by Education Seats Installed	119
Table 34: 2015 Ranking of CAM Providers by Education Seats Shipped by Brand	120
Table 35: 2015 Ranking of CAM Providers by Education Seats Installed by Brand	121
Table 36: 2015 Ranking of Providers Based on Total Headcount in CAM Organization	123
Table 37: 2015 Ranking of Providers Based on Number in CAM Product Development	124
Table 38: 2015 Ranking of Providers by Number of Resellers	125
Table 39: 2015 Ranking of Providers by Number of Direct Salespeople	126